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281.3939

# foreign agriculture circular

## processed fruits

Approved by the World Food and Agricultural Outlook and Situation Board • USDA

FCAN 1-79

April 1979

### EUROPE'S CANNED DECIDUOUS FRUIT PACK UP IN 1978; U.S. AND JAPANESE PACKS DOWN

#### Summary

The 1978 canned deciduous fruit pack in major European producing countries is estimated at 23.7 million cases<sup>1</sup>, slightly above the revised 1977 pack of 22.7 million cases. The increased packs in France, West Germany, Italy, and Spain more than offset the reduced output in Greece. Generally, more favorable growing conditions prevailed throughout Europe in 1978 compared with those of the 1977 season, when spring frosts and heavy summer rains reduced total fresh deciduous production.

The U.S. pack (excluding apples and applesauce) is placed at 48 million cases, down nearly 17 percent from the previous season's level. All canned packs except purple plums declined.

Production of canned fruits in Japan continued to decline, with 3.4 million cases packed in 1978 compared with 3.8 million cases in 1977. Canned white-fleshed peaches continued to comprise half of the total pack.

Total European, U.S. and Japanese packs in 1978 of mixed fruit, plums, other fruit, and sweet and sour cherries were up, while packs of peaches, pears, and apricots declined from their 1977 levels. The current U.S. apple and applesauce packs are ahead of the previous season; thus, these two canned groupings should also show an increase.

#### France

France's canned deciduous fruit pack in 1978 is estimated at 2.9 million cases, 28 percent above the short 1977 pack and only slightly below the 1973-1977 5-year average of 3.1 million cases. Favorable summer and fall weather resulted

in an overall good supply of fresh fruit, which permitted larger packs of most fruits. The small 1977 packs were the result of reduced fresh crops caused by adverse growing conditions throughout the season.

Mixed fruit production is estimated at 1.2 million cases, 30 percent above the 1977 pack, which was the shortest since 1969. Production of canned cherries and peaches in 1978 is estimated at 416,000 and 458,000 cases, respectively. Canned apricot production amounted to 125,000 cases despite a fresh crop that was nearly a third higher than last year's. Canned pear production of 167,000 cases was 11 percent above last season's but still only half of what was produced in 1976.

French imports of canned fruit have been increasing since 1975, when the European Community (EC) liberalized imports from third countries. As a result of the short fresh harvest in 1977, this trend was reinforced. However, the large fresh fruit crop in 1978 has resulted in slightly lower imports this season. Imports of canned fruit in syrup and natural fruit are expected to total 2.9 million cases, a decrease of 14 percent from the previous year's level.

French imports of canned peaches and apricots in 1977 from Greece increased 42.7 percent over the 1976 level and accounted for 64.7 percent of these imported products. However, Italy remained the most important supplier of canned fruit in 1977, accounting for 85 percent of the pears, 97 percent of the mixed fruit, 26 percent of the peaches, and 27 percent of other fruit.

As a result of reduced production and increased competition from third countries, the number of firms producing canned fruit in syrup reportedly has dropped from 65 in 1976 to 55 in 1977, with the largest 10 producing nearly 83 percent of the syrup pack in 1977. Partly as a result of pleas by the French canning industry, the EC has instituted a processor subsidy to make French canners more competitive. The current EC system of fixing prices for peaches has

<sup>1</sup>Cases of 24 1/2 can equivalents, 45 pounds or 20.4 kilograms, netweight basis.

encouraged increased imports of lower priced Greek products, and the new processor subsidy is designed to minimize the price differential between the two countries' products. However, it is not likely to increase production, and imports are expected to continue their upward trend since imported canned products are relatively less expensive.

# **FRANCE: CANNED DECIDUOUS FRUIT PRODUCTION CALENDAR YEARS 1974 TO 1978**

(Thousand cases equiv. 24 2½ cans¹)

Commodity	1974	1975	1976	1977	1978
<b>In Syrup:</b>					
Apricots	125	92	146	117	125
Cherries, sweet	558	337	408	242	416
Mixed fruit	1,224	958	1,220	895	1,166
Peaches	437	146	521	321	458
Pears	487	383	346	150	167
Other fruits²	566	333	566	416	416
Total fruit in syrup	3,397	2,249	3,207	2,141	2,748
<b>Natural Fruit:</b>					
(Water pack)	211	100	176	135	171
Grand total	3,608	2,349	3,383	2,276	2,919

¹Forty-five pound or 20.4 kg., net weight basis. ²Includes plums.

SOURCE: FAS Attache Reports.

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Commodity Programs, FAS, USDA

## **Federal Republic of Germany**

The 1978 deciduous fruit crop in the Federal Republic of Germany is estimated at 2.7 million tons, 38 percent above the previous year's—a result of nearly ideal growing conditions throughout the season with only minor, incidental spring frosts occurring during the blooming period.

The 1978 canned deciduous fruit pack is estimated at 3.8 million cases, 14 percent greater than the reduced 1977 pack. This increase is a result of the larger fresh fruit crop.

The 1977 canned deciduous fruit pack has been revised to 3.3 million cases, but still remains 26 percent below the record pack of 1976. This decline was attributed to a short fresh crop in 1977, which resulted in unusually high raw product prices.

During the 1977/78 crop year, imports of canned peaches from the United States represented 22 percent of the German import market—the highest share since the 1970/71 season, when U.S. imports held a 46 percent share.

Imports of red tart cherries from the United States continued to slide from the high achieved in the 1972/73 season. Imports amounted to 71,000 cases or 26 percent of total imports, down 19 percent from the previous year's level. Other major suppliers (1977/78 market shares in parentheses) included Italy (27 percent), Yugoslavia (17 percent), Belgium (16 percent), Greece (9 percent), and the Netherlands (1 percent).

# **GERMANY, FEDERAL REPUBLIC: CANNED DECIDUOUS FRUIT PRODUCTION¹ CALENDAR YEARS 1974 TO 1978**

(Thousand cases, equiv. 24 2½ cans²)

Commodity	1974	1975	1976	1977	1978
Apples³	1,654	1,821	1,669	1,472	1,562
Apricots	11	8	8	14	21
Cherries					
RSP	1,104	1,090	1,164	799	1,050
Sweet	150	155	315	126	263
Peaches	26	8	25	34	38
Pears	12	11	14	26	34
Plums⁴	844	377	1,199	764	771
Other fruits	48	51	72	87	62
Total	3,849	3,521	4,466	3,322	3,801

¹Includes sterilized fruit puree. ²Forty-five pound or 20.4 kg., net weight basis. ³Includes sliced apples and applesauce. ⁴Includes Greegages and Mirabilles.

SOURCE: FAS Attache Reports.

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Commodity Programs, FAS, USDA

## **Greece**

Greece's production of canned deciduous fruit in 1978 is estimated at 6.4 million cases, a decrease of 13 percent from the 1977 pack. Much of this decrease was a result of smaller apricot supplies.

Canned apricot output was sharply reduced because of a late winter frost in the major producing area, which resulted in an abnormally small fresh crop. This short supply situation led to increased demand for fresh use, and consequently only 735,000 cases of apricots were canned.

Canned peach production was up 16 percent from the 4.2 million cases of the previous year as the fresh crop continued to expand as a result of new trees coming into bearing.



Exports of canned deciduous fruit in 1977 are estimated at 6.5 million cases, about 1 percent below exports of a year earlier. Exports in 1978 are expected to remain at this level. The EC remains the principal market, with West Germany the major purchaser.

The Government again set minimum prices that canners were to pay for peaches, and established a subsidy, irrespective of variety, paid to farmers delivering their crop to processors. Thus, the producer was guaranteed a minimum of 9 U.S. cents per pound for cling peaches delivered for processing and 8 cents per pound for freestone peaches. Producers delivering peaches destined for juice were guaranteed a minimum of 5 cents per pound. Because of the very short apricot crop and satisfactory prices, no Government payments were necessary for the 1978 apricot crop.

**GREECE: CANNED DECIDUOUS  
FRUIT PRODUCTION  
CALENDAR YEARS 1974 TO 1978**  
(Thousand cases, equiv. 24 2½ cans¹)

Commodity	1974	1975	1976	1977	1978
Apricots	1,612	1,460	1,881	2,572	735
Peaches	2,278	2,739	4,968	4,238	4,899
Other fruits	309	407	353	475	735
Total	4,199	4,606	7,202	7,285	6,369

¹Forty-five pound or 20.4 kg., net weight basis.

SOURCE: FAS Attache Reports.

April 1979 Commodity Programs, FAS, USDA

### Italy

Production of canned deciduous fruit in Italy during 1978 is estimated at 7.2 million cases, 4 percent above last year's output and a tenth above the 1973-1977 average.

The poor pear crop, and the decline and lateness of most summer fruit, forced canners to compete with the fresh market, resulting in higher prices. This led to a decline in the pear pack. The peach pack is estimated at 1.5 million cases, just over a tenth greater than the 1977 pack.

The high cost of pears and peaches caused canners to process different kinds of cheaper fruit (some imported) and produce fruit cocktail and other similar products. Consequently, mixed fruit production of 4.2 million cases was 6 percent above the year-earlier level but 86 percent above the 1973-1977 5-year average.

Exports of canned deciduous fruit for 1977/78 declined considerably, reflecting the decreased canned pear output. Italy's exports are mainly to other EC countries. West Germany is the principal market, but the United Kingdom is assuming a greater importance, particularly for canned peaches and cherries.

The EC has appropriated 145.3 billion lira (\$174 million) to support Italian producers of peeled tomatoes and concentrates, peaches in syrup, and plums. In particular, there is a subsidy of 225 lira (27 U.S. cents) per kilogram granted to peach processors. Before the processor can collect this subsidy, however, he must agree to pay the grower a minimum price of 265 lira (32 cents) per kilogram. This has resulted in artificially high prices for peaches and could encourage increased plantings of new orchards.

According to Government directives, under the Four-Leaf Clover Plan the canning industry is expected to assume a larger role in developing agriculture. Financial assistance will be given in the establishment of growers' cooperatives, the construction of new canning plants, consolidation of small plants, and the moving of old plants to new, more convenient areas of production.

**ITALY: CANNED DECIDUOUS  
FRUIT PRODUCTION  
CALENDAR YEARS 1974 TO 1978**  
(Thousand cases, equiv. 24 2½ cans¹)

Commodity	1974	1975	1976	1977	1978
Apricots	74	49	49	34	34
Cherries, sweet	343	294	245	245	196
Mixed fruit	1,470	1,372	2,939	3,919	4,164
Peaches	1,421	1,078	1,470	1,372	1,519
Pears	2,695	2,303	2,499	1,127	1,078
Other fruits	416	294	245	196	196
Total	6,419	5,390	7,447	6,893	7,187

¹Forty-five pounds or 20.4 kg., net weight basis.

SOURCE: FAS Attache Reports.

April 1979 Commodity Programs, FAS, USDA

### Japan

Japan's canned deciduous fruit pack in 1978 continued to decline, totaling only 3.4 million cases, down a tenth from the previous year's revised pack of 3.8 million cases. Imports of canned fruit at 2 million cases were up substantially in 1978, compared with 1.6 million cases in 1977. Three-fourths of the imported canned fruit consisted of peaches, with the United States accounting for over half of the peach total.

The substantial appreciation of the yen made foreign products more competitive. The increase in imports from the United States—most of which go for institutional usage—principally reflected relatively low U.S. prices compared with those of Australia and South Africa.

Japan's canned peach pack in 1978 included 1.7 million cases of white peaches and 245,000 cases of yellow peaches—declines of 13 and 21 percent, respectively. Declines were also registered in all other packs with the exception of grapes, which increased significantly.

**JAPAN: CANNED DECIDUOUS  
FRUIT PRODUCTION  
CALENDAR YEARS 1974 TO 1978**  
(Thousand cases, equiv. 24 2½ cans<sup>1</sup>)

Commodity	1974	1975	1976	1977	1978
Apples	919	985	526	318	269
Apricots	25	26	16	13	10
Cherries, sweet	398	256	613	630	617
Grapes	39	23	68	34	44
Mixed fruit	337	227	334	451	441
Peaches					
White	2,962	2,227	2,003	1,962	1,715
Yellow	633	548	450	310	245
Pears					
Bartlett	156	97	126	104	88
Other	26	28	17	17	15
Total	5,495	4,417	4,153	3,839	3,444

<sup>1</sup>Forty-five pound or 20.4 kg., net weight basis.

SOURCE: FAS Attache Reports.

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Commodity Programs, FAS, USDA

### Spain

Fresh fruit production in Spain returned to a more normal level in 1978, following the severely frost-damaged crop of 1977. Although the spring season was quite rainy and hailstorms were reported in some of the leading peach growing areas at harvesttime, weather conditions were generally favorable for the deciduous crop in 1978. Canned deciduous fruit production is estimated at 3.4 million cases, 79 percent above the reduced 1977 pack.

The 1978 canned apricot pack is three times as large as the pack of the preceding year and up a tenth from the 1973-1977 5-year average. Canned peach production is estimated at 1 million cases, 67 percent above the 1977 pack but 2 percent below the 1973-1977 average. Production of other fruits in syrup (mainly pears and plums) is placed at 1.5 million cases.

Processed deciduous fruit exports for the first 9 months of the 1977/78 season totaled 2.2 million cases—nearly two-thirds below those in the equivalent period of 1976/77. The sharp decline in exports is attributed to the reduced 1977 crop, higher production costs, and the increased U.K. tariffs that became effective on January 1, 1978.

Despite the increase in tariffs the United Kingdom remained the leading market. Other major markets for Spanish canned deciduous fruits include West Germany, France, Belgium, and Libya.

**SPAIN: CANNED DECIDUOUS  
FRUIT PRODUCTION<sup>1</sup>  
CALENDAR YEARS 1974 TO 1978**  
(Thousand cases, equiv. 24 2½ cans<sup>2</sup>)

Commodity	1974	1975	1976	1977	1978
Apricots	1,400	700	700	300	900
Peaches	1,300	700	1,200	600	1,000
Other fruits <sup>3</sup>	1,300	1,100	1,600	1,000	1,500
Total	4,000	2,500	3,500	1,900	3,400

<sup>1</sup>In syrup. <sup>2</sup>Forty-five pound or 20.4 kg., net weight basis.  
<sup>3</sup>Mostly pears and plums.

SOURCE: FAS Attache Reports

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Commodity Programs, FAS, USDA

### United States

U.S. production of fresh fruit used for canning in 1978 increased slightly over that of the previous year to 5.9 million tons<sup>2</sup>. The 1978/79 canned fruit pack is estimated at 48 million cases<sup>3</sup>, 17 percent below the pack of the previous year, primarily because of the lower peach pack.

The 1978 apple crop totaled 3.4 million tons, up 13 percent from the previous year's with increased outturns in nearly all producing areas. The 1978/79 canned apple pack and applesauce pack through January 1 were running ahead of the previous season by 8 and 5 percent, respectively. The canned apple pack through January 1 is estimated at 1.3 million cases, and the applesauce pack at 9.2 million cases.

Fresh apricot production at 114,579 tons was down 14 percent from the previous year's level. However, the canned pack was down only 6 percent from the 2.3 million cases packed in 1977.

<sup>2</sup>Includes apples, apricots, sweet cherries, tart cherries, peaches, pears, plums, and prunes.

<sup>3</sup>Excluding apples and applesauce.

Sweet cherry production in 1978 totaled 140,561 tons, up nearly 5 percent from the previous year's. Adverse weather during the 1978 bloom in California resulted in the smallest crop since 1940. Canned sweet cherry production in 1978 amounted to 485,000 cases, down slightly from the 500,000 cases packed the previous year.

Production of tart cherries in 1978 totaled 82,192 tons, down 14 percent from the 95,664 tons produced in 1977. The tart cherry pack was also down, reflecting the shorter fresh crop in 1978—582,000 cases, compared with 605,000 cases in 1977.

The 1977 peach crop totaled 1.2 million tons, down nearly a tenth from the previous year's level. The clingstone crop in California was the smallest in two decades, reflect-

ing overall reduced area. The canned peach pack in 1978 amounted to 21.2 million cases, nearly 28 percent below last year's pack and the lowest since 1954.

Pear production totaled 659,712 tons, down nearly 8 percent from the 1977 level. Canned pear production in 1978/79 totaled 9 million cases, 6 percent below the previous year's level.

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UNITED STATES: CANNED DECIDUOUS FRUIT PRODUCTION  
CALENDAR YEARS 1974 TO 1978  
(Thousand cases, equiv. 24 2½ cans<sup>1/</sup>)

Commodity	1974	1975	1976	1977	1978
Apples <sup>2/</sup> .....	---	1,117	1,852	2,008	---
Applesauce <sup>2/</sup> .....	---	9,588	8,911	10,671	---
Apricots .....	1,987	4,421	2,387	2,269	2,127
Cherries, RSP .....	1,188	1,273	438	605	582
Cherries, sweet .....	623	412	464	500	485
Fruit Cocktail .....	14,907	13,677	13,605	12,980	11,725
Mixed fruit <sup>3/</sup> .....	1,835	1,291	1,249	2,159	1,942
Peaches, clingstone .....	28,983	25,691	22,783	27,568	19,639
Peaches, freestone .....	3,448	3,293	2,028	1,649	1,538
Pears .....	10,692	9,776	11,518	9,614	9,026
Purple Plums .....	1,166	1,447	1,042	817	923
Total .....	---	71,986	66,277	70,840	---

--- Denotes not available, unknown, or not applicable.

<sup>1/</sup> Forty-five pound or 20.4 kg., net weight basis. <sup>2/</sup> Comparable data not available prior to 1975/76. <sup>3/</sup> Includes fruit salad.

SOURCE: Fruit Branch, AMS, USDA.

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Commodity Programs, FAS, USDA



CANNED DECIDUOUS FRUIT: PRODUCTION BY  
COMMODITY AND SELECTED COUNTRIES,  
CALENDAR YEARS 1974 TO 1978  
(Thousand cases, equiv. 24 2½ cans<sup>1/</sup>)

Commodity and Country	1974	1975	1976	1977	1978
<u>APPLES</u>					
Germany, Fed. Rep. ....	1,654	1,821	1,669	1,472	1,562
Japan .....	919	985	526	318	269
United States 2/ .....	---	1,117	1,852	2,008	---
Total .....	---	3,923	4,047	3,798	---
<u>APPLESAUCE</u>					
United States 2/ .....	---	9,588	8,911	10,671	---
<u>APRICOTS</u>					
France .....	125	92	146	117	125
Germany, Fed. Rep. ....	11	8	8	14	21
Greece .....	1,612	1,460	1,881	2,572	735
Italy .....	74	49	49	34	34
Japan .....	25	26	16	13	10
Spain .....	1,400	700	700	300	900
United States .....	1,987	4,421	2,387	2,269	2,127
Total .....	5,234	6,756	5,187	5,319	3,952
<u>CHERRIES</u>					
<u>RSP</u>					
Germany, Fed. Rep. ....	1,104	1,090	1,164	799	1,050
United States .....	1,188	1,273	438	605	582
Total .....	2,292	2,363	1,602	1,404	1,632
<u>SWEET</u>					
France .....	558	337	408	242	416
Germany, Fed. Rep. ....	150	155	315	126	263
Italy .....	343	294	245	245	196
Japan .....	398	256	613	630	617
United States .....	623	412	464	500	485
Total .....	2,072	1,454	2,045	1,743	1,977
<u>FRUIT COCKTAIL</u>					
United States .....	14,907	13,677	13,605	12,980	11,725
<u>GRAPES</u>					
Japan .....	39	23	68	34	44
<u>MIXED FRUIT</u>					
France .....	1,224	958	1,220	895	1,166
Italy .....	1,470	1,372	2,939	3,919	4,164
Japan .....	337	227	334	451	441
United States 3/ .....	1,835	1,291	1,249	2,159	1,942
Total .....	4,866	3,848	5,742	7,424	7,713

continued .....



CANNED DECIDUOUS FRUIT: PRODUCTION BY  
COMMODITY AND SELECTED COUNTRIES,  
CALENDAR YEARS 1974 TO 1978 -- Continued  
(Thousand cases, equiv. 24 2½ cans<sup>1/</sup>)

Commodity and Country	1974	1975	1976	1977	1978
<b>PEACHES</b>					
France .....	437	146	521	321	458
Germany, Fed. Rep. ....	26	8	25	34	38
Greece .....	2,278	2,739	4,968	4,238	4,899
Italy .....	1,421	1,078	1,470	1,372	1,519
Japan .....	3,595	2,775	2,453	2,272	1,960
Spain .....	1,300	700	1,200	600	1,000
United States .....	32,431	28,984	24,811	29,217	21,177
Total .....	41,488	36,430	35,448	38,054	31,051
<b>PEARS</b>					
France .....	487	383	346	150	167
Germany, Fed. Rep. ....	12	11	14	26	34
Italy .....	2,695	2,303	2,499	1,127	1,078
Japan .....	182	125	143	121	103
United States .....	10,692	9,776	11,518	9,614	9,026
Total .....	14,068	12,598	14,520	11,038	10,408
<b>PLUMS</b>					
Germany, Fed. Rep. ....	844	377	1,199	764	771
United States .....	1,166	1,447	1,042	817	923
Total .....	2,010	1,824	2,241	1,581	1,694
<b>OTHER FRUIT</b>					
France <sup>4/</sup> .....	566	333	566	416	416
Germany, Fed. Rep. ....	48	51	72	87	62
Greece .....	309	407	353	475	735
Italy .....	416	294	245	196	196
Spain .....	1,300	1,100	1,600	1,000	1,500
Total .....	2,639	2,185	2,836	2,174	2,909
TOTAL FRUIT IN SYRUP ....	---	94,669	96,252	96,220	---
<b>NATURAL FRUIT (WATERPACK):</b>					
France .....	211	100	176	135	171
Grand Total .....	---	94,769	96,428	96,355	---

--- Denotes not available, unknown, or not applicable.

<sup>1/</sup> Forty-five pound or 20.4 kg., net weight basis. <sup>2/</sup> Comparable data not available prior to 1975/76. <sup>3/</sup> Includes fruit for salad. <sup>4/</sup> Includes plums.

SOURCE: U.S., Fruit and Vegetable Division, AMS, USDA; all other countries, FAS Attache Reports.

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